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Advertising Age®

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P&G trims Saatchi sails

Merger penalty: 4 brands, $85M

By STEWART ALTER and LAURIE FREEMAN

In a slap at the Saatchi & Saatchi autonomous agency network system, Procter & Gamble, the No. 1 ad spender, has rewarded agencies untouched by mergers and acquisitions by pulling $85 million in billings from the No. 1 agency network.

P&G also demonstrated, as it reassigned four brands from Saatchi agencies, that it was standing firm against appeals that it modify its U.S. "divisional" account-conflict policy.

Following what was reportedly six months of on-and-off discussions dating back to Saatchi's "loan" deal with Dancer Fitzgerald Sample, P&G rejected a final appeal from chairman Maurice Saatchi in a visit to Cincinnati about two weeks ago.

Building competing autonomous networks has become central to Saatchi's strategy, as well as that of

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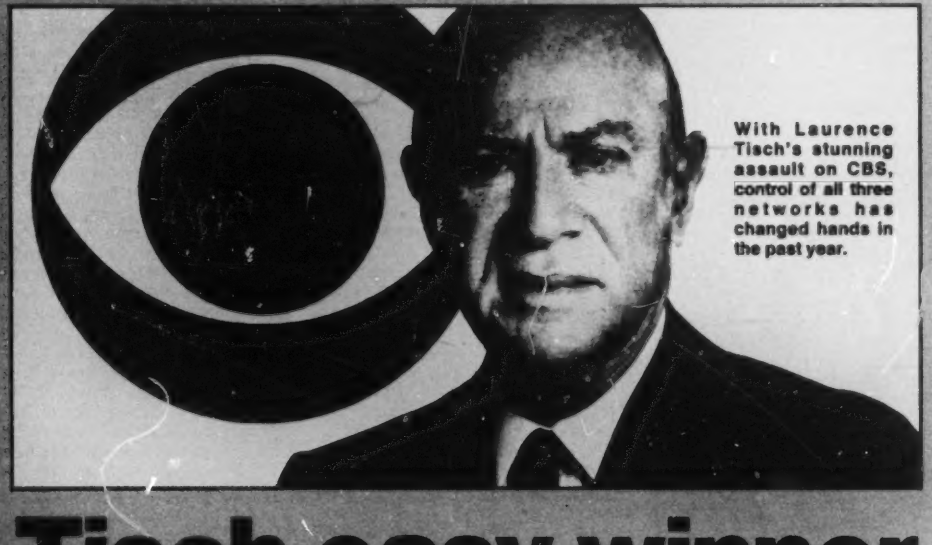
Procter & Gamble's shuffle

Procter & Gamble reinforced its stance on agency conflicts, moving $85 million in billings from the Saatchi agencies to other P&G agencies. *Source: Advertising Age.*

Account	Billings	Former agency	New agency
Luvs Baby Pants	$20 million	DFS Dorland, New York	Leo Burnett USA, Chicago
Bounty Paper Towels	$10 million	DFS Dorland, New York	Jordan, Manning, Case, Taylor & McGrath, New York
Crisco oil and shortening	$35 million	Saatchi & Saatchi, New York	Grey, New York
Duncan Hines baking mix line	$20 million	Saatchi & Saatchi, New York	Cunningham & Walsh, New York



With Laurence Tisch's stunning assault on CBS, control of all three networks has changed hands in the past year.

Tisch easy winner in CBS takeover

By VERNE GAY

New York—CBS Inc., buffeted by hostile takeover bids, slumping prime time ratings, a disenchanted news operation and nagging doubts about top management, finally has the answer to its most pressing question: What is Laurence Tisch going to do?

For starters, Mr. Tisch last week ousted CBS chairman-ceo Thomas Wyman as he carried out one of the most brilliant takeovers ever. Mr. Wyman made it easier for Mr. Tisch when he disclosed at the Sept. 10 board meeting that he had been trying to interest Coca-Cola Co. in buying CBS. The directors apparently were stunned by this unilateral move on Mr. Wyman's part. Soon after, he resigned.

Immediately, morale in the CBS newsroom rebounded. The company is no longer "in play," or considered vulnerable to hostile acquisition. And the company avoided a lengthy and costly takeover fight that could have set off untold regulatory problems had Mr. Tisch gone beyond his

(Continued on Page 120)

"We're encouraged because [Tisch] should put pressure on costs."
—A stock analyst

Lead clients to creativity, Jacoby urges

By JENNIFER PENDLETON

Incline Village, Nev.—American Assn. of Advertising Agencies chairman Robert Jacoby thinks U.S. advertising agencies have abdicated creative leadership to their clients and he wants to do something about it.

In a speech to the western region conference of the Four A's here, the chairman, president and ceo of Ted Bates Worldwide outlined a three-point program he will propose to the Four A's aimed at lifting advertising out of what he perceives as a creative malaise.

The objective is "to come to grips, once and for all, with the industry's priority need—a means of pinpointing the value of a truly creative advertising campaign—in terms of sales and market-share performance," Mr. Jacoby said.

The points include:

- Finding the best marketing minds in academia to develop a comprehensive plan to isolate and quantify the effectiveness of advertising campaigns.
- Selection of a blue-ribbon group of advertising professionals from both agencies and clients to work with academic leaders and to oversee the execution of the study.
- Funding the study through contributions from Four A's member agencies.

Mr. Jacoby emphasized he wants his proposed study to evaluate campaigns, not commercials, saying "the cumulative effect of advertising is the only effect that

(Continued on Page 118)

Last Minute News

Antidrug psas from 4A's coming this fall

Incline Village, Nev.—Public service announcements created as part of the American Assn. of Advertising Agencies' massive antidrug crusade are likely to be on the air after the November elections, Four A's president Leonard Matthews last week told the group's western region convention here. The Four A's has convinced Hollywood labor unions to allow talent to appear in the spots without demanding that sponsors contribute to the unions' pension funds, an unprecedented move.

GM plans 2.6% price hikes for '87 models

Detroit—General Motors will increase average prices of its 1987 model cars by 2.6% over comparably equipped '86 models. But GM will slice $601 from the price of the 1987 Chevrolet Chevette, an 11% drop to $4,995, as the No. 1 car maker tries to compete with a spate of new imports aimed at

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Highlights

P&G pulls brands from Saatchi 1
Procter & Gamble, rejecting appeals to modify its U.S. conflict policy, last week withdrew $85 million in billings from Saatchi & Saatchi Co. and reassigned four brands to agencies untouched by mergers and acquisitions.

Tisch makes his play for CBS 1
CBS Inc., buffeted by hostile takeover bids, slumping prime time ratings, a disenchanted news operation and nagging doubts about top management, finally has the answer to its most pressing question: What is Laurence Tisch going to do?

General Mills adds muscle 4
General Mills has spent the past year selling or spinning off nearly all its nonfood holdings, strengthening major food brands, entering more food categories, restructuring the food group's management and revamping its restaurants. The result is giving new vigor to a company that long has been a dominant force in the food industry.

Opportunity rings for Cohen 6
A poolside telephone call from Richard Avedon was the catalyst for a chain of events that led Arthur Cohen to take over as exec vp-advertising for Revlon.

'Parenting's' parents an unlikely match 45
A most improbable couple is making progress toward becoming the proud parents of *Parenting*. Few in the magazine industry would have believed that giant Time Inc., perceived as a bastion of bureaucracy, would join forces with a San Francisco-based female entrepreneur to start a special-interest publication. But it has.

IBM clashes with clones 52
Scrambling to fight off fierce low-cost competition from clones of its 5-year-old Personal Computer, IBM now faces a struggle at the high end of the market from a new generation of powerful desktop machines. Leading the assault is Compaq Computer Corp.

Will others follow Trojan breakthrough? 108
Carter-Wallace this month breaks a massive print campaign for market leader Trojan prophylactics that will run in several national magazines that never before accepted condom advertising. The multi-million-dollar campaign is expected to pave the way for other condom marketers to advertise in once-forbidden women's and men's magazines. It could lead to the elimination of network tv's long-standing refusal to air contraceptive commercials.

Toyota revs up for '87 110
Toyota Motor Sales shifts into high gear next month with new-car introductions and a much bigger ad budget. The company is betting its four all-new models plus record ad spending will lengthen its lead in the crowded 1987 import auto market.

INTERNATIONAL

Saatchi has direct ideas overseas 70
Saatchi & Saatchi's plan to open a full-service direct-marketing agency in the U.K. this year is a step toward expanding its direct-marketing network internationally. Unlike agencies such as Young & Rubicam and Ogilvy & Mather, Saatchi has not yet attempted to tackle direct marketing on a global basis. The company has targeted direct-marketing services for growth, but remains weak in the area outside the U.S.

OTHER NEWS

New-product introductions grew to 2,537 in the first half of 1986, a 7.8% rise from a year ago, according to a study by Marketing Intelligence Services. Page 24.

Mattel Inc. is taking more of its merchandising show on the road. Tours for Barbie, Masters of the Universe and My Child began at U.S. shopping centers last spring, and as many as five more will be added in 1987. Page 28.

DFS Dorland Worldwide and Gardner Advertising's Paul Schulman Co., analyzing the fall network tv ratings race, predict that NBC will remain the prime time front-runner, and that ABC could threaten CBS' hold on second place. Page 50.

Cutty Sark takes a new approach in the declining premium scotch market as it doubles its ad budget, to $15 million, and breaks two new ad campaigns, one of which includes an all-out attack on market-leader Dewar's. Page 54.

Now that the Statue of Liberty centennial hoopla has ended, promotional machinery for the U.S. Constitution's upcoming bicentennial is gearing up in earnest. Page 72.

The growing popularity of fish and its high price tag could lead to growth for surimi, an imitation shellfish now trying to win retail acceptance. Page 84.

SPECIAL REPORT

Women influence between 70% and 80% of all car purchases in the U.S., but auto marketers still are trying to figure out the best way to influence women buyers. Special Report profiles some of their efforts and industry leaders.

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Jack in Box pops away from HCM

By BRIAN LOWRY

Jack in the Box has pulled its $25 million account from HCM, Chicago, after a 10-month spin and moved to Cohen/Johnson, a small Los Angeles shop whose principals previously worked on the account.

An 11-person agency founded only 16 months ago, Cohen/Johnson will add at least 20 staffers by mid-November to handle the new business, said chairman-creative director Howie Cohen.

Dale Landaman, managing director of HCM, acknowledged the loss would result in layoffs, particularly in Los Angeles, where HCM had staffed up to serve the account (AA, Nov. 25). He said the agency "hopes to find places for the best people."

"We were never able to agree on a longer-term strategy" beyond discounting promotions, Mr. Landaman said of HCM's brief relationship with the San Diego-based fast-food marketer.

HCM won the account after a lengthy review (AA, Oct. 28) following a leveraged management buyout of the company from Ralston Purina Co., St. Louis.

The account previously was with Wells, Rich, Greene/West, Los Angeles, for eight years.

Another casualty of last week's move was Victor Elkind, adver-

(Continued on Page 118)

Tues. Teamers form new shop

By STEWART ALTER

NEW YORK—Joining other senior agency executives who see new opportunities in the megamerger era, four top creative and marketing officers from Ally Gargano/MCA Advertising and FCB/Leber Katz Partners have formed an agency of their own.

The new shop, called Messner, Vetere, Berger, Carey, emerges from the "environment for change" created by the wave of mergers and acquisitions, said Ron Berger, 36, who was senior vp-creative director of Ally Gargano/MCA Advertising.

Mr. Berger, along with Tom Messner, 42, and Barry Vetere, 43, all worked at Ally & Gargano before it merged to form AG/MCA. Messrs. Messner and Vetere, who were two of A&G's three top creative executives, had joined Walter Carey, 45, formerly exec vp-associate director, marketing planning at FCB/LKP, to form Tuesday Team II (AA, July 28, *et seq.*). That ad hoc agency's name reflects its work on the original Tuesday Team, the loose group of agency superstars that developed advertising to reelect President Reagan in 1984, on which Mr. Carey was chief operating officer.

All four will be partners in the Messner agency, housed at 485 Madison Ave. It expects to have $20 million to $25 million in billings within the next three months.

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West Coast news

Fox in shop search?

Twentieth Century Fox Television, Los Angeles, the tv syndication arm of Rupert Murdoch's entertainment company, may open a review for its first agency before the end of the year, sources say. The division, reorganizing after the departure of vp-creative services Jerry Greenberg, currently uses various agencies for projects.

Pacific Bell, San Francisco, on Oct. 15 begins a nine-part soap opera-type campaign. The series features a continuing story of two older men speaking to each other on the phone. The two each love the same woman and the catch is, who gets the girl? Foote, Cone & Belding, San Francisco, handles.

Fromm & Sichel, Santa Rosa, Cal., will break a national print and outdoor campaign for Christian Brothers brandy in *Bon Appetit*, *Glamour* and other upscale publications in mid-October. Ads play off the way the brandy sometimes is ordered in bars as "CB." Goodby, Berlin & Silverstein, San Francisco, handles.

Raging Waters, San Dimas, Cal., an aquatic amusement park, is contacting Southern California agencies concerning the creative portion of its estimated $1 million-plus account. Adams McMillan, Carlsbad, Cal., will continue to handle media buying.

California Milk Advisory Board, Modesto, will introduce Vital 15, a low-fat, high-calcium milk drink aimed at women, in San Diego this week with $1.2 million in ad support. Theme is "Vital 15: Nutrition designed for a woman's body." McCann-Erickson, San Francisco, handles.

Ad study uncovers spending patterns

CHICAGO—The 1986 edition of Ads Forecasts, the tenth annual research report on advertising expenditures, has been released by Pansophic Systems.

The study shows advertising-to-sales ratios, advertising-to-gross margin ratios and advertising growth rates for each industry in 1985, by SIC category. In addition, it forecasts 1986 and 1987 advertising spending by category and for more than 4,000 individual companies and 280 industries; rates advertising effectiveness for each company and industry listed, and measures ad-spending stability. The study, formerly produced by Schoenfeld & Associates, was included in Pansophic's February acquisition of that software company's assets. Pansophic is one of the largest independent software companies in the world.

Shown at right is the table listing average '85 ratios by industry. The study cautions, however, that within many industry sectors, individual companies may spend significantly more or less than the average.

The raw data for the study were compiled from 10-K reports filed by publicly owned companies with the Securities & Exchange Commission. Therefore, advertising expenditures include both media spending and nonmedia expenditures such as collateral literature and production. For this reason, these figures often are substantially larger than figures from media auditing services.

In some categories, the figures may include substantial nonmedia advertising, such as catalog advertising by retailers, point-of-purchase advertising in alcoholic beverages and direct mail in financial services.

Because data for the study were compiled from published financial statements rather than surveys, cautious interpretation is required for several reasons. Companies may vary in what they include under advertising expenditures. Also, many large companies are in several fields, yet are listed in only their primary industry sector. Distortion may also result because a large subsidiary may not be included in the industry in which it competes. Finally, a few large companies are privately held and their figures are not included.

In the section of the study that includes the 1987 ad-spending forecast, Procter & Gamble is predicted to hold its role as the top ad spender in 1987 with $1.3 billion—slightly ahead of Philip Morris Cos. at $1.2 billion.

General Motors and Sears, Roebuck & Co. are both projected by Ads Forecasts to top the $1 billion mark, and Unilever and Ford Motor Co. are expected to come in just under that figure.

In 1987, food companies will lead all industries in ad spending with $5.1 billion, the survey projects. Retail department stores will take second place with $4.6 billion, followed by motor vehicles at $3.8 billion.

Major new industries—retail mobile home dealers and freight forwarding—will emerge as large advertising spenders in the next few years, with an ad growth rate of 54.6% and 39.4%, respectively, the study reports.

Other high advertising growth industries predicted by the study include: Aircraft parts at 37%; real estate dealers at 34.4%; outpatient care facilities at 30.5%, residential general building contractors at 28.4% and retail computer stores at 27.3%.

Foreign companies will remain a competitive factor in many markets. Matsushita Electric is predicted to spend $564.6 million on advertising in 1987, considerably more than most U.S. companies. Spending at Honda is expected to be $381.9 billion, an increase of more than 6%, and Hitachi is estimated to hit $306.9 million.

A copy of the 179-page study is available for $325 ($300 prepaid) from Pansophic Systems, 1550 Northwest Hwy., Suite 208, Park Ridge, Ill. 60068.

Advertising-to-sales ratios, 1985 (By industry)

Source: Pansophic Systems, Inc., 1550 Northwest Highway, Park Ridge, Ill. 60068 (312) 390-7711. Legend: SIC - Standard industrial classification. NEC - Not elsewhere classified. Ad dollars as per cent of sales - Ad expenditures/net sales. Ad dollars as per cent of margin - Ad expenditures/(net sales-cost of goods sold). Annual growth rate of advertising dollars.

Industry	SIC no.	Ad dollars as per cent of sales	Ad dollars as per cent of margin	Annual growth rate (%)
Agriculture Production-Crops	100	2.1	7.0	14.7
Agriculture Produc-Livestock	200	2.1	7.8	11.4
Gold & Silver Ores	1040	.1	.2	-55.5
Misc Metal Ores	1080	1.9	9.8	20.9
Crude Petroleum & Nat'l Gas	1311	.2	.2	2.5
Drilling Oil & Gas Wells	1381	2.0	7.7	-69.1
Oil & Gas Field Exploration	1382	1.1	5.0	-8.6
Oil & Gas Field Services NEC	1389	.1	.2	-.1
Misc Nonmetallic Minerals	1480	.1	.4	9.9
Operative Builders	1531	2.3	15.1	5.6
Gen Bldg Contractors Nonres	1540	.3	2.4	1.0
Construction-Not Bldg Constr	1600	.3	2.1	-5.0
Construction-Spl Contractors	1700	1.9	6.4	17.2
Food & Kindred Products	2000	5.2	17.4	4.5
Meat Products	2010	1.7	13.5	14.9
Dairy Products	2020	5.1	16.4	9.5
Canned-Preserved Fruits-Vegs	2030	5.3	14.6	6.8
Flour & Other Grain Mill Pds	2041	1.6	10.2	1.2
Wet Corn Milling	2046	.2	.9	5.7
Prepared Feeds for Animals	2048	8.9	22.6	7.9
Bakery Products	2050	1.5	3.3	8.2
Beet Sugar	2063	.3	1.5	16.7
Candy & Other Confectionery	2065	6.5	16.3	5.6
Malt Beverages	2082	8.4	23.6	13.0
Distilled Rectif Blend Bevrg	2085	7.2	18.6	5.6
Bottled-Canned Soft Drinks	2086	6.6	12.4	9.0
Food Preparation NEC	2099	2.3	7.1	8.0
Cigarettes	2111	4.2	14.3	8.2
Cigars	2121	3.2	4.5	16.8
Textile Mill Products	2200	2.1	11.4	4.2
Knitting Mills	2250	2.5	8.7	-9.8
Floor Covering Mills	2270	.8	3.3	-.5
Apparel & Other Finished Pds	2300	2.3	7.8	9.8
Lumber & Wood Products	2400	.3	1.7	7.9
Wood Buildings-Mobile Homes	2450	1.4	7.8	8.1
Household Furniture	2510	2.6	9.0	14.5
Office Furniture	2520	1.6	4.2	11.2
Paper & Allied Products	2800	1.3	5.5	12.1
Convert Paper-Paperbd Pd NEC	2849	1.9	4.3	7.3
Printing Publishing & Allied	2700	1.7	3.7	4.3
Newspapers: Publishing-Print	2711	2.5	5.9	12.3
Periodicals: Publishing-Print	2721	4.0	8.0	5.2
Books: Publishing & Printing	2731	4.0	7.1	8.5
Commercial Printing	2750	1.2	3.4	12.4
Manifold Business Forms	2761	.5	1.2	9.3
Greeting Card Publishing	2771	3.7	8.3	8.3
Chemicals & Allied Prods	2800	1.9	8.1	6.0
Indl Inorganic Chemicals	2810	16.7	40.1	7.8
Plastic Matr Synthetic Resin	2820	.7	2.6	2.7
Drugs	2830	8.9	14.2	3.9
Biological Products	2831	1.8	4.2	13.8
Medicinal Chemical Botanical Pds	2833	1.5	2.6	-26.7
Pharmaceutical Preparations	2834	7.1	11.3	6.9
Soap & Other Detergents	2841	7.9	19.9	6.6
Perfumes Cosmetics Toil Prep	2844	13.1	21.3	7.2
Paints-Varnishes-Lacquers	2850	2.8	7.9	9.2
Industrial Organic Chemicals	2860	.1	.5	9.4
Agriculture Chemicals	2870	.4	1.8	15.6
Misc Chemical Products	2890	2.9	8.0	5.2
Petroleum Refining	2911	.2	.9	4.7
Paving & Roofing Materials	2950	1.2	6.7	-2.4
Rubber & Misc Plastics Prods	3000	2.0	6.6	9.1
Fabricated Rubber Prods NEC	3069	.5	1.4	-14.8
Misc Plastic Products	3079	1.2	4.0	9.4
Footwear Except Rubber	3140	4.5	12.2	4.5
Leather Goods NEC	3199	6.7	18.7	13.1
Flat Glass	3210	.2	.8	21.9
Glass Containers	3221	2.2	5.7	4.5
Structural Clay Products	3250	1.6	4.8	15.8
Concrete Gypsum & Plaster	3270	.2	.8	-8.3
Abrasive Asbestos & Misc Min	3290	1.3	4.8	6.8
Steel Furnaces & Steel Works	3310	2.0	12.5	16.8
Prim Smelt-Refin Nonfer Mtl	3330	-0-	.2	-100
Rolling & Draw Nonfer Metal	3350	.2	1.1	-16.6
Misc Primary Metal Products	3360	.8	2.8	5.2
Metal Cans & Shipping Cont	3410	7.0	22.8	-4.7
Hardware NEC	3429	6.3	12.6	4.4
Heating Equip & Plumbing Fix	3430	2.5	6.8	11.3
Solar Energy Equip & Comp	3437	1.2	3.5	12.9
Fabricated Plate Work	3443	.6	4.5	-5.1
Sheet Metal Work	3444	2.0	9.7	9.2
Prefab Metal Bldgs & Comp	3448	1.0	4.9	8.7
Misc Metal Work	3449	.8	1.9	5.7
Bolts-Nuts-Screws-Riv-Washrs	3452	.8	3.3	4.4
Metal Forgings & Stampings	3460	1.9	7.0	8.0
Ordnance & Accessories	3480	8.7	27.4	1.6
Valves & Pipe Fittings Ex Brss	3494	.9	3.3	8.9
Fabricated Metal Prds NEC	3499	.7	2.5	9.6
Engines & Turbines	3510	1.6	5.8	8.9
Farm & Garden Machinery & Eq	3520	1.4	6.7	7.9
Construction Machinery & Eqp	3530	.6	2.1	9.2
Oil Field Machinery & Equip	3533	.5	1.4	.3
Hoist-Indus Cranes-Monorail	3536	1.7	5.3	15.8
Indl Trucks-Tractors-Trailers	3537	.8	4.1	2.9
Metalworking Industry & Eqp.	3540	4.0	11.4	20.5
Special Industry Machinery	3550	1.4	4.1	8.2
Pollution Control Machinery	3568	.5	2.2	12.4
General Ind. Mach & Eq	3569	1.1	3.8	5.5
Office Computing & Acctg Mch	3570	1.1	1.8	4.5
Refrig & Service Ind Machine	3580	1.8	6.6	7.3
Elec & Electr Mach Eq & Supp	3600	1.7	5.7	2.1
Elec Transmission & Distr Eq	3610	1.0	3.1	13.0
Electrical Industrial Apper	3620	2.8	9.7	9.2
Industrial Controls	3622	1.4	3.7	13.8
Household Appliances	3630	4.3	15.3	8.8
Electrical Lighting-Wiring Eq	3640	1.1	3.3	12.2
Radio-TV Receiving Sets	3651	2.4	6.4	11.3
Phonograph Records	3652	9.1	19.0	-19.1
Tele & Telegraph Apparatus	3661	1.4	4.0	7.2
Radio Tv Transmitting Equipment	3663	.8	2.4	9.9
Search Nvig Guid Sp Eq	3664	1.8	6.4	1.8
Training Equip & Simulators	3665	.9	2.3	-100.0
Alarm & Signal Prods NEC	3669	2.6	6.3	9.6
Commun & Singal Prods NEC	3669	1.0	2.0	12.9
Electronic Components & Access	3670	.7	2.8	-0.4
Semiconductors & Rel Devices	3674	1.1	2.7	10.3
Electronic Components NEC	3679	2.3	6.2	8.3
Electronic Computing Equip	3680	1.4	2.7	9.7
Computers - Mini & Micro	3681	6.5	15.7	16.9
Computers-Mainframe	3682	1.5	2.5	7.8
Computer Terminals	3683	2.1	5.0	9.5
Computer Disk & Tape Drives	3684	.9	4.4	4.5
Optical Char-Laser Scanners	3685	1.2	2.4	18.8
Computer Graphics Systems	3686	1.3	2.4	17.7
Office Automation Systems	3687	2.9	4.5	16.6

Industry	SIC no.	Ad dollars as per cent of sales	Ad dollars as per cent of margin	Annual growth rate (%)
Computer Peripherals	3688	2.1	6.2	12.9
Computer Equipment NEC	3689	2.0	4.8	17.7
X-ray, Electromedical Apparat	3693	1.9	3.4	8.7
Robotics	3695	2.5	9.2	13.4
Electrical Machy & Equip NEC	3699	4.8	14.9	5.8
Motor Vehicles & Car Bodies	3711	1.6	0.0	8.7
Motor Vehicle Parts-Accessor	3714	.5	1.9	8.1
Motor Homes	3716	1.1	6.7	3.9
Aircraft & Parts	3720	1.3	5.5	10.0
Aircraft	3721	.8	4.0	8.5
Aircraft Parts & Aux Equip	3728	.1	.3	37.0
Ship-Boat Building & Repairing	3730	1.8	8.0	15.0
Motorcycles Bicycles & Parts	3750	1.9	9.8	8.9
Travel Trailers & Campers	3792	.8	4.1	11.9
Engr Lab & Research Equip	3811	1.7	3.8	13.5
Measuring & Controlling Inst	3820	2.0	6.5	14.0
Automatic Cntls Envrt & Appl.	3822	-0-	.1	6.8
Industrial Measurement Instr	3823	1.7	3.8	3.4
Elec Meas & Test Instr	3825	1.3	3.0	6.7
Meas & Controlling Dev NEC	3829	1.2	2.5	8.9
Optical Instruments & Lenses	3830	1.9	4.6	15.7
Surg & Med Instruments & App	3841	1.3	3.1	6.7
Ortho-Prosth-Surg Appl & Supp	3842	1.3	3.4	7.1
Dental Equip & Supplies	3843	2.1	4.1	15.4
Opthalmic Goods	3851	3.0	5.8	14.8
Photographic Equip & Suppl	3861	3.7	8.0	4.8
Watches Clocks & Parts	3870	1.6	5.4	.3
Jewelry-Precious Metals	3911	1.8	6.4	28.3
Silverware-Plateware	3914	2.5	9.8	2.0
Musical Instruments	3931	3.9	21.6	-0-
Toys & Amusement Sport Goods	3940	10.0	23.0	19.4
Pens-Pencil & Oth Office Mat	3950	5.3	12.2	8.4
Misc Manufacturing Industries	3990	3.6	8.4	8.2
Intercity & Rural Hywy Trans	4131	5.3	71.8	7.2
Trucking-Local & Long Distance	4210	2.4	12.4	17.5
Water Transportation	4400	.1	.2	.9
Air Transportation-Certified	4511	2.0	12.5	8.1
Transportation Services	4700	4.5	13.1	6.3
Telephone Communication	4811	1.4	4.0	-1.8
Telegraph Communication	4821	1.2	4.0	12.9
Radio-TV Broadcasters	4830	3.8	9.9	11.1
Communications Services NEC	4890	2.3	8.1	7.8
Cable Television Operators	4891	2.3	4.0	8.3
Telephone Interconnect Sys	4892	1.3	4.9	20.5
Natural Gas Transmis-Distr	4923	-0-	.1	24.3
Sanitary Serv	4950	.7	2.3	90.1
Whsl-Autos & Parts	5012	4.5	17.9	8.7
Whsl-Lumber & Constr Matl	5030	1.0	2.7	15.2
Whsl-Sporting & Recrea Goods	5040	2.5	9.3	4.4
Whsl-Metals & Minerals	5050	.1	.6	10.4
Whsl-Elec Apparatus & Equip	5063	.1	.3	21.3
Whsl-Elec Appliance TV & Radio	5064	6.6	18.1	8.8
Whsl-Electronic Parts & Equip	5065	2.6	9.5	8.6
Whsl-Hardwr Plum Heat Equip	5070	4.8	31.9	7.3
Whsl-Machinery & Equipment	5080	2.0	.4	.7
Whsl-Durable Goods NEC	5099	5.0	17.0	14.4
Whsl-Drugs & Proprietary	5120	.7	4.4	1.0
Whsl-Groceries & Related Pds	5140	1.3	10.8	9.8
Whsl-Petroleum & Petro Pds	5170	.2	1.5	20.1
Whsl-Nondurable Goods NEC	5199	1.8	8.9	13.8
Retail-Lumber & Bldg Mat	5211	2.7	12.7	12.2
Retail-Mobile Home Dealers	5270	1.3	4.4	54.6
Retail-Department Stores	5311	3.5	14.6	9.1
Retail-Variety Stores	5331	2.4	8.8	10.1
Retail-Grocery Stores	5411	1.4	5.7	7.1
Convenience Stores	5412	.4	1.8	16.5
Retail-Auto Dealers & Gas Stat	5500	1.6	6.1	7.5
Retail-Apparel & Acces Store	5600	2.5	6.4	15.2
Retail-Womens Ready To Wear	5621	2.9	.6	18.9
Retail-Shoe Stores	5661	2.2	6.1	.8
Retail-Furniture Stores	5712	5.8	14.9	21.8
Retail-Hshld Appliance Store	5722	5.7	19.0	15.3
Retail-Radio Tv & Music Str	5730	4.8	14.7	19.2
Retail-Eating Places	5812	3.7	17.4	11.3
Retail-Drug & Proprietr Stores	5912	1.4	5.4	10.8
Retail-Jewelry Stores	5944	6.2	13.7	7.1
Retail-Sewing & Needlework	5949	3.8	8.1	10.2
Retail-Mail Order Houses	5961	13.2	36.7	8.1
Retail-Auto Mdsng Mach Oper	5962	1.3	2.2	5.1
Retail-Fuel & Ice Dealers	5980	.7	3.8	-1.5
Retail-Computer Stores	5995	2.9	10.7	27.3
Retail-Stores NEC	5999	4.2	11.4	12.0
Savings & Loan Associations	6120	.7	1.9	14.1
Personal Credit Institutions	6140	1.8	3.1	10.1
Business Credit Institutions	6150	.2	.3	8.0
Finance-Services	6199	2.5	10.4	13.8
Security & Commodity Brokers	6200	.6	5.8	6.7
Insurance Agents Brokers & Serv.	6400	.8	2.9	-.5
Real Estate	6500	1.5	5.1	15.3
Operators-Nonres Bldgs	6512	3.3	6.5	11.0
Operators-Apartment Bldgs	6513	.7	2.2	-19.0
Real Estate Agents & Mgrs	6531	1.7	4.6	18.5
Real Estate Dealers	6532	1.4	3.9	34.4
Subdivid Develop Ex Cemetery	6552	2.6	10.4	10.4
Patent Owners & Lessors	6794	3.5	16.0	5.9
Real Estate Investment Trust	6798	3.0	7.9	19.3
Hotel-Motels	7011	3.5	12.7	13.6
Serv-Personal	7200	7.5	20.8	14.3
Serv-Advertising Agencies	7311	.1	.2	3.7
Credit Reporting Agencies	7321	1.7	7.9	6.6
Serv-Clean & Maint to Bldg NEC	7349	1.5	8.5	-22.2
Personnel Supply Services	7360	1.9	8.1	2.3
Serv-Computer & Data Process	7370	1.4	3.3	9.2
Serv-CMP Program & Software	7372	2.8	7.2	17.1
Serv-Data Processing Svcs	7374	.9	2.9	7.0
Serv-Computer Rel Svcs NEC	7379	1.5	2.1	10.3
Serv-Research & Developmnt Lab	7391	1.3	15.0	23.2
Serv-Mgmt Consulting & PR	7392	.2	.8	6.3
Serv-Detective & Protective	7393	1.2	5.0	7.7
Serv-Equip Rental & Leasing	7394	2.5	5.1	3.2
Photofinishing Laboratories	7395	4.7	11.7	-1.9
Commercial Testing Labs	7397	2.3	7.6	28.9
Serv-Business Services NEC	7399	4.2	9.7	7.9
Serv-Automotive Repair & Ser	7500	3.4	9.2	11.1
Serv-Motion Picture Productn	7810	9.0	30.2	-13.7
Serv-Motion Picture Theatres	7830	4.1	18.2	8.9
Serv-Racing Incl Track Oper	7948	4.4	20.4	12.5
Serv-Misc Amusement & Recrea	7990	4.7	15.7	11.9
Serv-Nursing-Person Care Fac	8050	1.1	6.3	9.0
Serv-Hospitals	8060	3.2	12.0	18.1
Medical & Dental Labs	8070	.6	1.5	-10.3
Outpatient Care Facilities	8081	1.6	10.5	30.5
Health & Allied Services NEC	8091	1.3	3.3	4.1
Serv-Educational	8200	4.1	10.2	-11.5
Serv-Engineering & Architect	8911	1.1	3.6	18.8

Special Report

Women and the Auto Market

Unlocking mystery surrounding consumer category

By Julie Candler

Now that automotive marketers have a picture of the female consumer in mind, they're finding she has an enigmatic smile.

What does she want? Economy or performance cars? Targeted, soft-sell promotions or low-cost financing? Ads addressed directly at her or a nonsegmented approach?

It's easy enough to read research reports that say women influence between 70% and 80% of all car purchases in the U.S. The difficult part is figuring out how to tap into that market.

Difficult, maybe, but critical. Industry researcher J.D. Power predicts that in the next five years, the U.S. auto industry faces the toughest competition in its history as it grapples with a continuing influx of imports and consumer resistance to price increases. Among marketers, he says, the eventual winners might be those who gain women buyers' loyalty.

Detroit-based Julie Candler is a frequent contributor to Special Report.

Women want cars with style

Major reasons for buying a car

	% of *McCall's* female subscribers
Appearance/styling	62.2%
Comfort	52.3
Gas mileage	50.1
Price	48.5
Handling	47.6
Previous experience with manufacturer	33.4
Safety	28.9

Source: *McCall's* 1986 subscriber survey

It's already clear that women can make or break individual car models. According to Motor Vehicle Manufacturers Assn. statistics, women buy 69% of Nissan Pulsars, 62% of Cadillac Cimarrons, 60% of Toyota Corolla SR5s, Plymouth Turismos and Pontiac Fieros and 58% of Ford Escort EXPs. They also buy more than half of Nissan Sentras, Pontiac 1000s, Sunbirds and Grand Ams, Oldsmobile Calais and Toyota Corollas and Celicas.

"It's growing in intensity. As a force it's so powerful that it is time to do something about it," says A.C. "Bud" Liedler, general marketing manager for Detroit-based Chrysler Corp.'s Chrysler-Plymouth division.

In addition to separate ad campaigns, car marketers are targeting women through shifted media buys, dealer training and special promotions. These strategies are part of a pursuit

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Unlock mystery

(Continued from Page S-1)

pursuit of women buyers that has been accelerating every year since 1975, when women bought 29% of all vehicles.

In 1985, women spent $46 billion to buy 4.6 million of the 10.8 million cars sold in the U.S., according to Edsel B. Ford II, general marketing manager at Ford Motor Co.'s Lincoln-Mercury division, Detroit.

By 1990, females will account for 44% of all sales, say the automotive market researchers at J.D. Power & Associates, Westlake Village, Cal. Others project females will be half the market by then.

A 249-page Conde Nast Publications' survey published this month concludes that women play a role in 87.5% of all automotive purchases. The survey, by Significance Inc. of Ridgewood, N.J., reports that women buyers typically are employed fulltime, younger and more likely to be single than males who buy.

The Conde Nast report suggests that although women may buy the same cars as men do, their reasons frequently are different. They buy small cars for economy of maintenance and mileage as well as purchase price. Because many women lack repair skills, they are concerned about dependability.

Women buy more imports than males, largely because they perceive them as dependable and worry-free. And because they rely heavily on friends' advice, their influence extends beyond their own purchases.

But one of the main tenets of the Conde Nast study is that female buyers cannot be viewed as a homogeneous group. The study, which divides women buyers into six categories, says auto marketers must employ segmentation in reaching these consumers.

Conde Nast says the largest group, the "value seekers," accounts for one of every five female car buyers. The other five groupings, in order of size, are the driving enthusiasts, domestic budget-minded, comfort seekers, affluent luxury seekers and the voluntary minimalists.

An example of the accelerated pursuit of women customers is supplied by Robert B. Jarboe, director-marketing at Detroit-based General Motors' Oldsmobile division. Preliminary plans call for 63% of Oldsmobile 1987 model year ad budget to go to prime-time tv. Shows bought will have an audience richer in females (53%) than males.

Another 27% of the budget, spent in magazines, this year will be split evenly between traditional men's books such as *Sports Illustrated* and magazines, including *People*, with larger female readerships. Pages in women's books such as *Cosmopolitan* and *Redbook* will total 32, up about 25% from last year.

Another 4% of the budget is expected to go to the nation's top newspapers, including *USA Today*.

Women buy 37% of all Oldsmobiles. But because so many of the division's models are appealing to buyers 50 and older, the company is targeting professional and managerial working women 25 to 54 years old and putting a bit more emphasis on dependability in over-all ad themes.

Many auto marketers and industry observers say the best approach is to include women in ads without creating a separate marketing campaign. That philosophy has been a cornerstone of marketing policy for Toyota, Nissan, Mazda and Honda, importers whose success with women buyers has kept thousands of small Japanese cars steaming toward U.S. shores *(see accompanying chart)*.

It's worked for European companies, too. In 1987, for the first time, ads for Volkswagen of America, Troy, Mich., will show people, departing from the product-as-star tradition. "They will be equally divided between males and females, not as an overt attempt to solicit one market segment but to show a different variety of people who buy VWs," says Ron Dusenberry, national advertising manager for Volkswagen. "The ads will be very upscale, not condescending or patronizing." DDB/Detroit, Troy, Mich., handles.

The nonsegmented approach also has worked well for domestic marketers. Women comprise 44% of all buyers for GM's Pontiac Motor division, and the sporty Fiero leads the U.S.-based companies in its ability to attract consumers who previously bought foreign models.

"In demographics, we are moving right in with the buyers of imports," says Bill Heugh, Pontiac manager-marketing. "Now 48% of our buyers are under age 35, while at Toyota it's only 44%. We figure when you go after young, high-spirited people you capture males and females, whoever is out there buying products. The importers were into that idea a lot earlier."

Says Mark Gjovik, management supervisor for Pontiac at D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich., "We strongly disagree with the strategy where you feminize advertising for the woman buyer. Anytime women sense 'This is an appeal because I'm a woman,' I think they get suspicious and offended. It's condescending."

Pontiac ad manager Charlene Curry says, for example, both males and females responded positively to the 1986 tv commercial featuring a mother whose teenage son encourages her to buy a sporty red Sunbird.

But while the nonsegmented approach has been successful for Pontiac, some experts disapprove. Jayne Hamilton, consultant on the women's market and president of Market Development Associates, Bloomfield Hills, Mich., says she doesn't understand why cars should be treated differently from other products—tobacco and clothing, for instance—featured in ads prepared specifically for the women's magazines. "Products advertised in *Vogue* and *Cosmopolitan* are never generically discussed," she says. "You need to talk to women."

J.D. Power & Associates research director Charles Shillingburg agrees. "Women want more information on cars and they don't feel they are getting it," Mr. Shillingburg says. "According to our research, a sizable proportion of women would like to see women's magazines provide more informative articles or advertising. We intend to investigate the types of information they would want. Our guess is that it would be different from what men want."

Mr. Shillingburg's theory is that, as often is said of package goods, "Men buy and women shop," and therefore women ask for more information before making a decision.

"Some car makers have very high proportions of women buyers and they shouldn't be ignoring it," he says. "They should be pointing out the benefits to women. I think they need a separate campaign and a separate media plan." He recommends buys in women's books because "that's what they read."

Media buys for 1987 models show that many car marketers agree with his assessment. "We are looking at some specific women's magazines," says Ms. Curry at Pontiac. "We know most of our competition is out there making a concerted effort [to attract women buyers] and we want women to know that we care, too."

GM's Chevrolet division in the 1986

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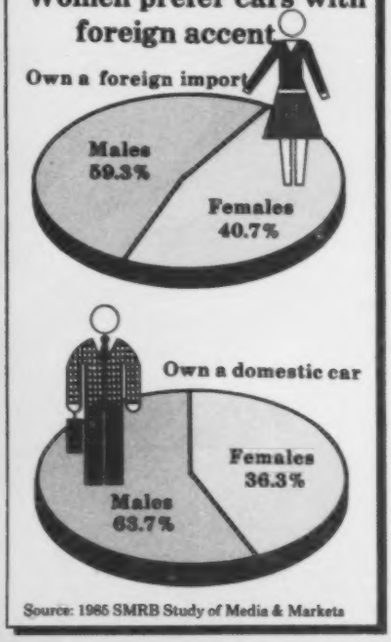
Conde Nast puts the pieces together

Value seekers—These women want it all. They are aggressive drivers and like cars with great pickup, yet they will watch the price. Japanese name plates score well with them, although they do like Dodges. Most are single, average age 29, working fulltime and have attended college.
Comfort seekers—The oldest purchasing group, these women are very conservative when purchasing an automobile. Most are retired, and few attended college. They try to save money and look for rebates. They prefer larger domestic cars, including Oldsmobiles and Buicks
Driving enthusiasts—Life in the fast lane: These women like sports and gambling, and are keenly interested in their cars. They are single, 30-35 and prefer American performance cars such as Pontiacs, Chevys and Dodges.
Affluent luxury seekers—With household incomes $20,000 higher than the average, these women are the big spenders. They will not hesitate to spend money on an expensive European import. Most are married and work fulltime in a professional position. Average age is 41. They don't buy as many American cars as Detroit could wish.
Voluntary minimalists—These women choose to spend as little time as possible thinking about cars. Most are married, well-educated, white-collar workers with an average age of 40. They prefer Chevys, Fords, Plymouths and AMCs.
Budget-minded—These consumers are family-minded homemakers. Their average age is 43 and very few have attended college. If they work, they hold clerical or factory positions. They love American cars—Fords, Chevys and Oldsmobiles—and stay away from foreign models.
MARKET
Ellis

Source: 1986 Conde Nast Report

Women prefer cars with foreign accent



Source: 1986 SMRB Study of Media & Markets

Reliability key to imports' success with women

Car purchased has reputation for being dependable

	Agree completely	
	Females	Males
Total	41.5%	35.3%
Own a foreign car	63.1%	47.4%
Own a domestic car	36.2%	33.0%

Car purchased is "worry-free"

	Agree completely	
	Females	Males
Total	44.1%	37.6%
Own a foreign car	58.3%	42.6%
Own a domestic car	42.1%	34.0%

Source: 1986 Conde Nast Report

"Word of mouth" advice speaks well with females buying cars

	Females	Males
Car purchased was "recommended by someone I know"	31.0%	24.3%
Foreign car purchased was "recommended by someone I know"	43.3%	36.3%
Domestic car purchased was "recommended by someone I know"	27.3%	21.1%

Source: 1986 Conde Nast Report

Cadillac and *Vogue* engineer stylish promotion

By Raymond Serafin

Where marketing to women is concerned, Cadillac is in *Vogue* —to advertise a mall promotion it is conducting with the help of Conde Nast Publications' fashion monthly.

In a pilot program that began March 25, General Motors Corp.'s luxury division has teamed up with New York-based *Vogue* to present a multimedia fashion and car display in upscale shopping malls. High-fashion murals attract women shoppers to kiosks, where the ultra-soft sell includes a computerized light and sound show about the $26,000 Seville Elegante and an offer to test drive the car.

> ***"Seville lends itself to an association with high fashion."***
> **John Grettenberger Cadillac**

"The women we're trying to attract are interested in high fashion and have the wherewithal to attain it," says John O. Grettenberger, GM vp and general manager for Detroit-based Cadillac. "*Vogue* is extremely well-respected by them.

"And Seville lends itself to an association with high fashion."

Norman Waterman, *Vogue* associate ad director, calls the matchup "an ideal demographic situation. Women come to *Vogue* for ideas on how to live their lives with style."

Dubbed "Cadillac expressions with viewpoints from *Vogue*," the program is designed to entertain as well as to inform. A continuous three-screen audio-visual presentation presents a *Vogue* program on contemporary women's life styles, while interactive video booths offer consumer tips on health, beauty, fashion and automobiles.

While Cadillac developed and funds the promotion, the magazine maintains control over the photos and editorial matter.

A sweepstakes offers prizes, including a $500 shopping spree at the mall and a "fashion week" in Paris valued at $5,000. All who test drive a Cadillac receive a complimentary tote bag.

"The sweepstakes gives us a contact point to assess further interest," says Peter Levin, Cadillac director-merchandising. The names of those women who do show interest are forwarded to a telemarketing company that sets up appointments for test drives at dealerships.

The Seville is one style Cadillac would like *Vogue* readers to use to express themselves.

"This is a recognition that going to an automotive showroom is not always the most pleasant thing in a woman's life," Mr. Levin says. "We're trying to reach out to women in a relaxed, positive environment."

Mr. Grettenberger says the program represents Cadillac's first effort aimed exclusively at women.

Company statistics show that about one-third of the principal drivers of the Seville, redesigned as a front-wheel-drive car for 1986, are women. Cadillac officials believe higher visibility in women's circles could boost that figure to 50%.

The display, which debuted at Phoenix's Biltmore Fashion Park, stays in a mall four to five days. According to Mr. Levin, 70% of the women surveyed thus far have said the program improved their image of Cadillac.

In addition to national and regional ads in *Vogue*, Cadillac gives dealers ad slicks and radio scripts to promote the mall displays. Cadillac agency D'Arcy Masius Benton & Bowles, Bloomfield Hills, Mich., handles.

Mr. Grettenberger says Cadillac likely will continue the show in some form after its 23-week pilot run in western states. The division is considering expanding the program. Variations under consideration include: Adding the Allante, a $50,000 two-seat convertible designed by Italian stylist Sergio Pininfarina, to displays; developing a separate program for medium-size markets, and preparing a program for use exclusively in dealerships.

Cadillac and *Vogue* drove right into the mall for a promotion designed to entertain and inform.

Unlocking category mystery

(Continued from Page S-4)

model year ran an eight-page "Women in Motion" advertorial insert in eight issues of *Cosmopolitan*. Editorial pages featured a fitness topic; only the ads addressed automotive subjects. Four sections contained a preapproved credit application.

"We probably won't do as large a campaign in any one magazine for '87," says Jane Hammond, chairwoman of Chevrolet's Women's Marketing Committee, which, like a group at Chrysler, helps develop strategies for reaching women.

Unlike Pontiac, however, since 1981 Chevrolet has been addressing ads directly to women in magazines such as *Working Woman*. In tv spots, Chevy replaced some sports buys with more female-audience prime-time programing.

Mr. Ford emphasizes that Lincoln-Mercury, too, recognizes the importance of the women's market. While he once doubted the value of women's books, the division this spring announced a schedule of ads in books such as *Ms.*, *Savvy* and *Working Woman*.

And although their success with female buyers has been credited to nonsegmented advertising, many importers also are targeting media buys to women.

Now that women account for more than 40% of American Honda Motor Co. sales, advertising to them will be "a little more aggressive," says Gerry Rubin, president of Rubin, Postaer & Associates, Los Angeles, agency for the Gardena, Cal.-based company.

This month, when Honda dealers gather in Reno, Nev., to see new model cars, they will view a videotape featuring Gloria Steinem, *USA Today* publisher Cathleen Black and four leading Honda dealers discussing marketing to women.

Nissan Motor Corp. U.S.A., Torrance, Cal., will decrease its tv sports buys to make room for programs that attract more female viewers, says Terry Foutz, national car ad manager.

But he cites focus-group research showing that women don't want to be singled out. "They want to be treated as intelligent consumers who have the money to make their own choices."

Women are the subject of promotions

Although advertising seems to attract the most attention, U.S. auto marketers are using a variety of promotions designed with women buyers in mind.

- Chevrolet's first extensive campaign targeting women, launched in the 1986 model year, included a series of two-day "Strategies" career conferences in major markets. Featuring celebrities like Barbara Walters in addition to Chevrolet product displays, the first six meetings drew 15,000 visitors. The company predicts 100,000 will have attended by the summer of 1987.
- Women buy 43% of the cars sold by Chrysler Corp., where corporate vps appoint 20 men and women to the company's Advisory Committee on the Women's Automotive Market.

Chrysler chairman Gerald Greenwald outlined specific programs targeting women in a May speech to women's magazine editors and writers. "AutoInfo," in-depth discussions by sales, service and product experts, will be held in major markets, with three scheduled for this year. In addition, "Right from the Start" evening workshops are designed to introduce recent buyers to dealer service personnel, who outline maintenance basics.

Plymouth also is spending $1 million this fall in a joint promotion with New York-based Cosmair's L'Oreal cosmetics. Chrysler-Plymouth's general marketing manager, A.C. Liebler, says 18,000 retail outlets will have promotional materials. The campaign features the company's new Sundance model and L'Oreal's new Sundance lipstick and nail enamel.

Ads in the September issues of *Cosmopolitan*, *Glamour* and *Working Woman* kick off a giveaway of 10 cars and trips to New York for L'Oreal makeovers. Sundance ads will run next month.

Mr. Liebler adds that Chrysler-Plymouth will test "American Women's Life" conferences in Atlanta and Philadelphia, featuring local authorities, psychologist Sonya Friedman as moderator and celebrity keynoters.

- Instead of conferences, both Lincoln-Mercury and Ford divisions set up product displays and offer free test drives at national conventions that draw young career women.

Other Ford Motor Co. appeals to women include a free car-buying reference guide, "Car Buying Made Easier." L-M also is developing shop-at-home video-cassettes. Available free, they contain nine-minute clips about the company's nine car lines.

At its recent new model introduction for dealers in Century City, Cal., the division presented optional seminars on attracting women customers.

- American Motors Corp. formed a Women's Task Force in 1985. The nine members offer new-product evaluations and travel to major cities for radio, tv and newspaper interviews. They discuss Renault passenger cars and the advantages for women of four-wheel-drive vehicles such as AMC's Jeep Cherokee and Wagoneer sport utility models, 19.5% of which were purchased by women in 1985.

—Julie Candler

Sponsors who think big can turn special events into banner events

When Paul Britten thinks outdoor advertising, he thinks *big* outdoor advertising. Not just little dinky billboards, but 1,000-ton banners that cover the side of an office building or a football field.

Britten, president of Britten Banners, Washington, D.C., formed the company in January to design and sell outdoor advertising ideas to corporate sponsors of special events. He became interested in outdoor advertising as an architecture student at the University of Detroit. By the time he graduated in 1985, he'd designed two banners for General Motors Corp.

Using a special process of nylon-reinforced paper that makes the banner lightweight and durable, Britten first designed a football field-size Christmas card. "Santa's sleigh is a Chevrolet" was emblazoned on the banner positioned across a GM building. Another GM sign showed the Detroit Tigers and GM logos, with the theme, "Two No. 1 Teams."

Britten's main project in Washington thus far has been a $75,000 "birthday card" for the Statue of Liberty's 100th anniversary measuring 135 ft. by 95 ft. It hung for four days on the downtown building of its corporate sponsor, Perpetual American Bank.

"It's a pr stunt, but stunts like this work," Britten says. "It's an interesting outlet for corporations. Even though the banners are only up for a week, everyone remembers them—unlike the common billboard, which may be up for two years and no one notices it."

Britten likes to tie banners to special events such as the Constitution's upcoming bicentennial, the 1988 Olympics or the International Congress of Large Dams. He then finds corporate sponsors—not always the easiest sale in the world. He had wanted to hang the Liberty card near New York's Battery Park but couldn't obtain a New York backer.

But Britten knows he has something special to offer. "Our motto," he says, "is if you have something big to say, say it big."

Janet Meyers

Britten Banners 1986

Britten Banners' Christmas card covering Chevrolet headquarters in Warren, Mich., was as long as a football field.

Fashion's brought to its knees with a new fanciful accessory

Designer knee pads seem an unlikely idea. But Stewart Seidman, president of J.J. Gams, New York, has already sold 1 million pairs of Kid Knees and Trend Knees, fanciful fashion knee pads with an average price of $5 a pair.

Now available in such diverse emporiums as Bloomingdale's, Macy's, K mart, Venture Stores and Kids 'R' Us, the hand-washable knee pads can double as elbow pads too. Although they're stitched together with a Velcro-fastened back pocket for storing keys or money, Kid Knees are hardly utilitarian. In fact, a disclaimer on the package states the pads should not be used "for protective purposes or as a medical device."

The knee pads are attention-getting accessories that J.J. Gams hopes will become as much a part of a child's wardrobe as socks and as valued as trading cards. Embellished with glitter or characters like Ghostbusters, Slime Ghost and Mad Balls, the pairs of pads can be split up and traded off with friends for other designs.

Kid Knees even have a bit of Hollywood behind them and will be worn by junior players on fall episodes of "Who's the Boss," "Different Strokes" and "Mr. Belvedere."

Also in the works are promotional tie-ins with Ralston-Purina and McDonald's.

Think of it as "a mini t-shirt with a message," Seidman says.

Pat Sloan

Ralph Snart currently is tied up, but his wacky mind is unbound

Have you ever had one of those days? You know the kind. Those days when if just one more thing goes wrong, if the boss says just one more stupid thing, you're going to go over the edge for real. They'll have to take you away to the funny farm.

Take a deep breath and pick up a copy of "Ralph Snart Adventures," a new comic devoted to the delusions of an accountant who went over the edge ahead of you.

A combination of art styles influenced by "Mad" magazine of the 1950s and 1960s (particularly "Mad" artist Don Martin) and the underground "comix" of the late 1960s and 1970s (particularly the infamous R. Crumb), "Snart" is pure satire, aimed at sophisticated adult audiences. The comic pokes fun at media images, office politics, feminism and just about everything else as crazy Ralph dreams up wild adventures from the comfort of his straightjacket in the Montgomery Home for the Really Insane.

The product of comic artist Marc Hansen, a former designer for advertising graphics house Grazziano, Kraft & Zale, "Snart" was originally published as a three-issue black and white miniseries by Chicago-based NOW Comics with a limited press run of about 15,000 copies distributed through direct sale comic shops around the country.

Fans took to the book immediately, and even though the creator had planned to end with the miniseries (and the eventual cure of poor Ralph), it looks like a long stay in the looney bin for the hero.

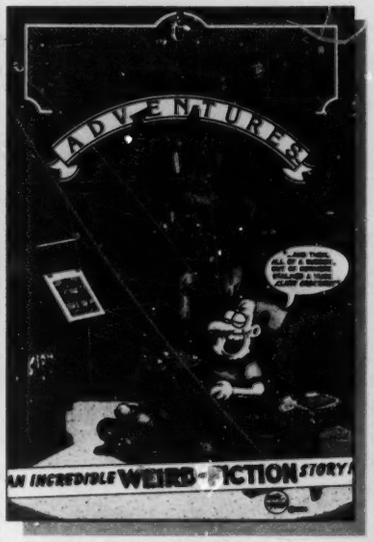
"Ralph has a lot of appeal," explains NOW publisher Tony Caputo. "He's just like you and me. He had one bad day too many at the office and just snapped. Everyone identifies."

"Ralph Snart Adventures" begins monthly publication in October with 28 pages of story and art for $1 with immediate distribution in comic specialty shops and eventual distribution through chain bookstores including Waldenbooks and B. Dalton, Caputo says.

" 'Snart' is not the usual kid's comic book," he adds. "Although it can be read by a younger audience, it is really for and about adults, and it should be distributed where adults can find it."

Also coming for Christmas is the "Ralph Snart Adventures" graphic novel in full color, and after the success of a one-of-a kind Ralph Snart soft sculpture at a recent Chicago comic convention, possibly a Snart doll that you can straightjacket in the privacy of your own home.

Len Strazewski



"Ralph Snart Adventures" chronicles the delusions of an accountant who just couldn't take it anymore.

New York banks add a personal touch to automated services

Cash machines are getting friendlier.

Citibank, for example, has units that are bilingual and "speak" English and Spanish, while banks such as Chemical and Manufacturer's Hanover in New York are trying make money more accessible to all their

Braille instruction plates placed over Chemical's automatic teller machines make the atm process easier for the bank's blind customers.

The hot seats

"Currents" takes a look at the latest concert scene with a listing of the top 10 concert draws for the past month.

Headliner, supporting acts	Venue, city, dates	Total attendance (capacity), No. of shows	Promoter or sponsors	Gross ticket sales
1. Neil Diamond	Madison Sq. Garden, New York, July 24-31	152,319 (19,039) 8 sellouts	Delsner Ents.,	$2,927,835
2. Neil Diamond	Greek Theatre, Los Angeles, August 14-28	84,674 (6,048) 14 sellouts	Nederlander, Miller Beer	2,374,884
3. Van Halen, B.T. Overdrive	Centrum, Worcester, Mass., Aug. 11-12, 14-15	48,500 (12,125) 4 sellouts	Don Law Co.,	762,386
4. ZZ Top, Honeymoon Suite	The Forum, Inglewood, Cal., August 14-16	43,721 (14,573) 3 sellouts	Beaver Prods.,	758,903
5. ZZ Top, Honeymoon Suite,	Cow Palace, San Francisco, August 8-10	40,959 (13,653) 3 sellouts	Beaver Prods.,	708,708
6. ZZ Top, Honeymoon Suite	The Summit, Houston, August 25-27	39,968 (13,322) 3 sellouts	Beaver Prods.,	699,440
7. Van Halen, B.T. Overdrive	The Spectrum, Philadelphia, August 4-6	46,774 (15,591) 3 sellouts	Electric Factory	691,523
8. Van Halen, Loverboy, B.T. Overdrive	Exhibition Stadium, Toronto, Canada, August 19	30,799 (35,000)	Concerts Prods., Molson Tour '86	634,459
9. Bob Seger, Fabulous Thunderbirds	Riverbend Theatre, Cincinnati, August 18-19	34,000 (17,000) 2 sellouts	Nederlander, Miller Beer	507,610
10. Van Halen, B.T. Overdrive	Capital Centre, Landover, Md., August 8-9	31,071 (16,000) 2 shows	Cellar Door	497,136

Source: *Amusement Business*

Hair-restorer drugs brush with the FDA

By PAT SLOAN

New York—At least three marketers are expected to bring out new products next year that claim to replace thinning hair.

Upjohn Co., Kalamazoo, Mich., is expected to introduce Regaine, a hair-restorer drug that still has not received Food & Drug Administration approval.

Wayne, N.J.-based American Cyanamid's Lederle Laboratories has an experimental compound called viprostol in preliminary clinical tests and reportedly is working on a second nonprescription hair-regrowth product. Viprostol also has not been approved by the FDA.

Crinos International SpA, a drug and cosmetic company based in Como, Italy, expects by early 1987 to import Foltene, a hair-regrowth product it already markets in Europe and Canada.

Foltene, however, will be positioned as a hair preparation "to keep your hair stimulated and healthy looking," according to Alan Klein, president of International Partnerships, a New York and Paris-based consultancy specializing in multinational acquisitions and licensing agreements, which is handling Foltene's search for a U.S. distributor. IP was a division of Foote, Cone & Belding until Mr. Klein spun it off in 1984.

The hair-preparation designation would make Foltene a cosmetic, and would not need FDA approval as a prescription drug. Product packaging and advertising will make no reference to actual hair regrowth. However, the company plans a publicity effort to encourage discussion in consumer articles of Foltene's properties of hair regrowth and prevention of further hair loss—claims the product does make in its European advertising.

Introduced in Europe five years ago, Foltene became the "third-largest-selling product in all categories of goods sold in French pharmacies" within the first three years, according to Mr. Klein. Toothpaste was first and Biotherm, L'Oreal's skincare line, was second.

"In every country where it's sold, it has consistently ranked within the top 10 products according to IMS audits," he said.

No agency has been named for Foltene which at $32 per box of 10 vials—a typical recommended treatment would call for two boxes initially and then one every six months—is priced much less than Regaine, the cost of which is expected to exceed $85 a month.

Though Upjohn Co. has to receive FDA approval for its long-awaited hair restorer lotion, financial analysts still expect the drug marketer to introduce Regaine sometime next year. Analysts are projecting $200 million in sales during the first year against an initial target market of 2 million men. Klemtner Advertising, New York, handles Regaine, the brand name for Upjohn's minoxidil compound, which will be available only by prescription. Minoxidil has been approved for prescription sale in Canada.

Though its competitors are saying Lederle will have its product out by 1987, a Lederle spokesman countered, "That's impossible. There's no way. We still have to get Food & Drug Administration approval."

One analyst, who wished not to be identified, said no approval is likely for viprostol before the end of the decade. However, he said Cyanamid might take a version of the active drug in combination with a placebo and position it as a hair-regrowth cosmetic, instead of a drug, so that it could be sold without prescription.#

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Coffee market shares

If you look at the market share percentages coffee makers hold, the dominance of a few becomes evident. Source: John C. Maxwell Jr.

	1981	1982	1983	1984	1985
Regular coffee					
General Foods					
Maxwell House*	20.2	19.5	19.0	18.6	18.8
Master Blend	5.2	6.9	7.5	8.0	9.0
Sanka	3.5	3.7	3.9	4.7	4.6
Max-Pax & Brim	3.2	2.8	2.7	2.6	3.2
Yuban	1.6	1.3	1.0	0.7	0.6
Mellow Roast	0.8	0.6	0.5	0.4	0.3
Total	34.5	34.8	34.6	34.4	36.5
Procter & Gamble					
Folgers	24.0	23.6	24.9	26.2	27.0
Hills Brothers					
Hills Brothers	6.0	6.7	7.4	8.1	8.4
Chock Full O'Nuts	4.2	4.2	5.0	5.8	5.4
Coca-Cola					
Butternut	1.8	1.7	1.5	1.4	1.5
Maryland Club	1.0	1.0	1.0	1.0	1.0
Total	2.8	2.7	2.5	2.4	2.5
Subtotal	71.5	72.0	74.4	76.9	79.8
All others	28.5	28.0	25.6	23.1	20.2
Grand total	100.0	100.0	100.0	100.0	100.0
Instant coffee					
General Foods					
Maxwell House	22.2	22.5	22.5	22.9	23.7
Sanka	10.2	10.2	10.1	10.0	9.8
Brim	3.9	4.1	4.3	4.0	3.4
Maxim	3.3	2.8	2.6	2.4	2.3
International Coffees	1.1	1.3	1.6	1.9	2.0
Freeze-Dried Sanka	2.3	2.2	2.1	2.0	1.8
Yuban	1.0	0.8	0.6	0.5	0.4
Mellow Roast	1.5	0.8	0.5	0.3	—
Total	45.5	44.7	44.3	44.0	43.4
Procter & Gamble					
Folgers	11.0	12.0	12.5	13.0	13.3
High Point	5.3	5.5	5.1	4.0	3.4
Decaffeinated Folgers	—	—	—	2.0	2.6
Total	16.3	17.5	17.6	19.0	19.3
Nestle					
Taster's Choice 100% Coffee	9.2	9.3	9.5	9.7	9.8
Taster's Choice Decaffeinated	5.7	5.8	6.1	6.4	6.6
Nescafe Regular	7.2	6.5	6.1	5.7	5.5
Nescafe Decaffeinated	2.2	2.1	2.2	2.3	2.1
Sunrise	1.8	1.8	1.8	1.6	1.2
Decaf	0.5	0.4	0.3	0.2	—
Total	26.6	25.7	25.8	25.9	25.2
Borden					
Kava	1.1	1.0	0.9	0.8	0.7
Subtotal	89.5	88.9	88.6	89.7	88.6
All others	10.5	11.1	11.4	10.3	11.4
Grand total	100.0	100.0	100.0	100.0	100.0

*Electra-Perk is roughly 6% all years.

Changing tastes grinding away at coffee sales

By JOHN C. MAXWELL JR.

For over 20 years, the coffee industry has had a long-term decline, though the last few years have shown a flattening trend. However, we continue to believe the trend toward cold and sweet drinks and away from hot and acrid drinks will continue to have adverse ramifications on the coffee industry for the foreseeable future.

There are those who believe the industry can do three things to possibly overcome some of these trends. The first is to raise the quality of the product, particularly in the ground area. The second is to offer more products and further segments in the industry, such as the soft-drink industry has done, so there is something for everyone's taste. Last, but not least, an advertising program to further elevate the image of coffee might be put into place. A recent study shows that 80% of the people in their 20s in 1963 drank coffee. This percentage is now down to 40%.

As was the case in the past, decaffeinated coffee appears to be the growth area in 1985. This ties in with the health syndrome of the 1980s, helped by the aggressive advertising of caffeine-free products in the soft-drink industry. In the last few years there seemed to be a trend toward soluble coffee, but this appears to have flattened out, probably because of the big jump in price. In the market-share game, General Foods continues to move ahead in the regular-coffee area, but lost slightly in the instant area *(see above)*.#

Mr. Maxwell is with Furman Selz Mager Dietz & Birney, New York.

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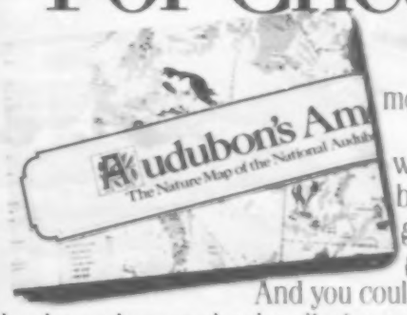

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